

# How to use promotion export/import

This guide shows you how to export and import promotion into effectmanager using an Excel-file.

*This guide is only of relevance if you have the promotion module in effectmanager.*



If you have corrections to a large number of promotions, you can easily make these corrections using the exporting function in the Reports Module.

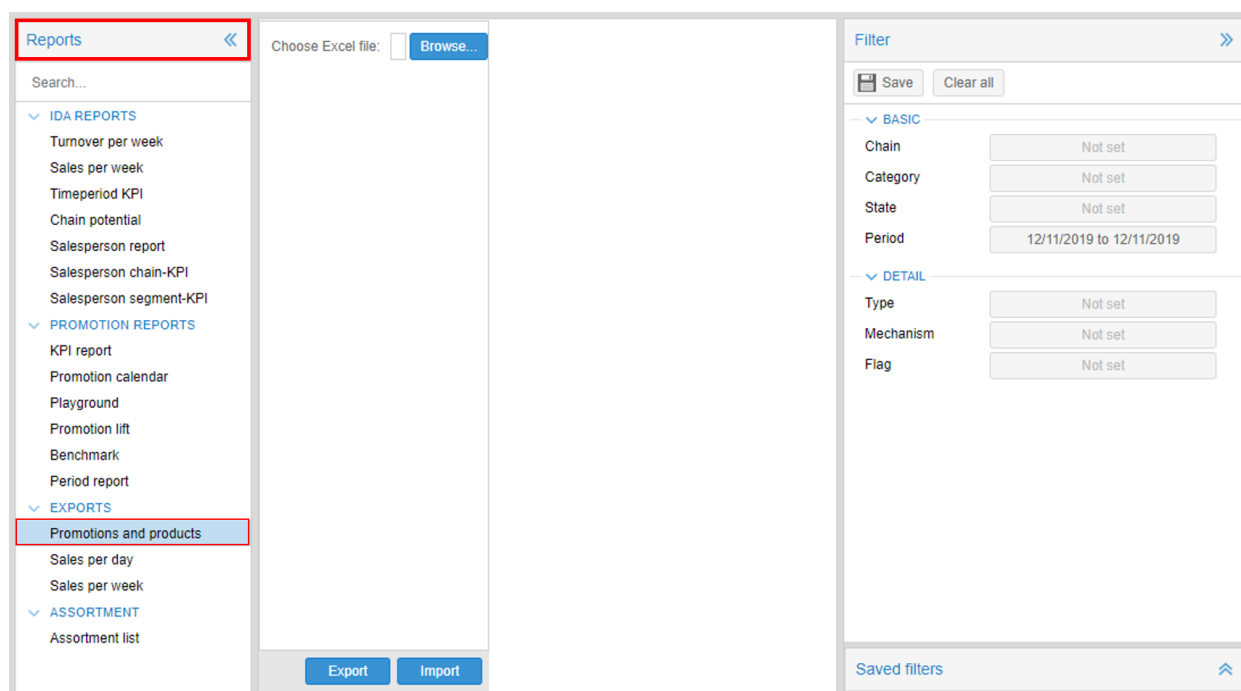
In this article, you will find a guide that shows you:

- [How to export and import promotion using Excel-file](#)
- [How to create new promotions using the Excel-file](#)
- [How to update promotion using the Excel-file](#)

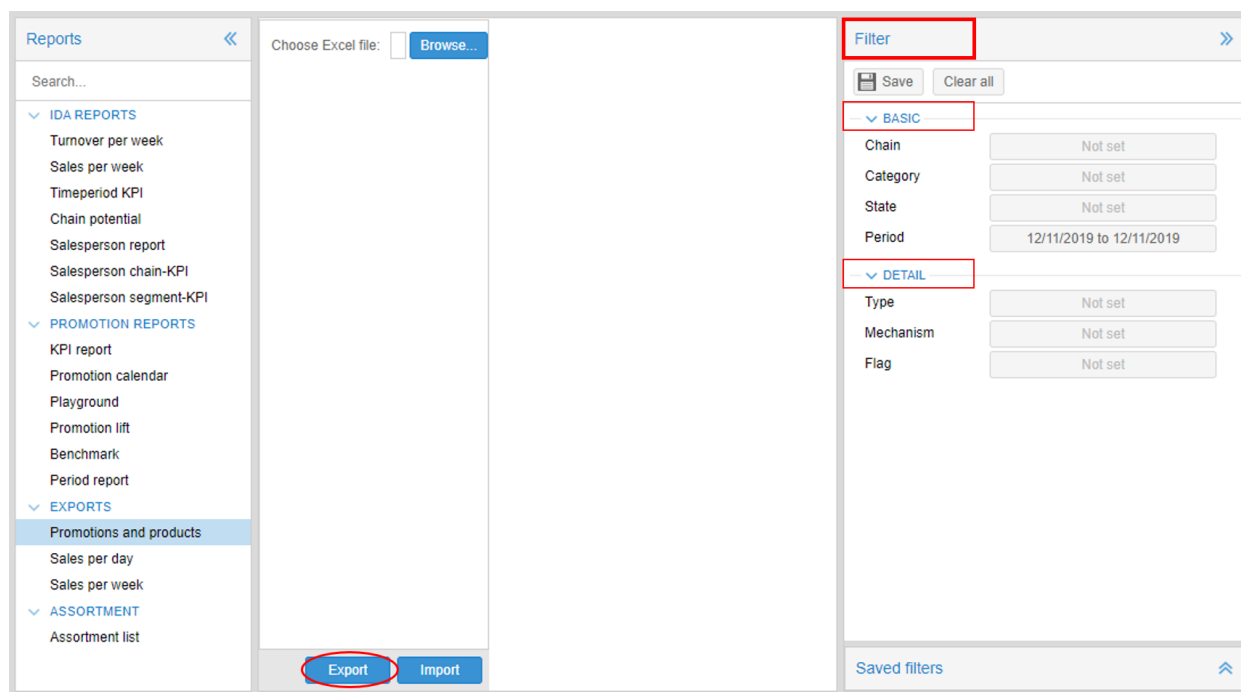
## How to export and import promotions using Excel-file

When you have corrections for promotion and connected products, these changes can be made using our export/import function in the Reports Module.

**1.** In the Reports Module navigate to the left side menu and find *EXPORTS - Promotions and Products*.



**2.** In the filter on the right side, select your filtering criteria. You can filter on basic criteria like; Chain, Category, State and Period. You can add a detail filter like; Type, Mechanism or Flag. Finish by pressing *Export*.



**3.** Fill out the Excel-file with your correction  
See our guides below, for further instruction on how to use the Excel-file.

- [How to create a new promotion using the Excel-file](#)
- [How to update a promotion using the Excel-file](#)

**4.** Import your corrected promotion to effectmanager by pressing *Browse* - Select the file in the pop-up window. Upload the file by pressing *Import*.

**⚠ OBS!** Importing the Promotions and Products Excel-file will block Promotion Scheduler while the corrections are being imported. We recommend importing the file at the end of the business hours.

The screenshot shows the 'Reports' interface. On the left, a sidebar lists various reports under categories like 'IDA REPORTS', 'PROMOTION REPORTS', 'EXPORTS', and 'ASSORTMENT'. The 'Promotions and products' report is selected under 'EXPORTS'. In the main area, there is a 'Choose Excel file:' field with a 'Browse...' button circled in red. Below this, there are 'Export' and 'Import' buttons, with the 'Import' button circled in red. On the right, a 'Filter' panel is visible, showing various filters like Chain, Category, State, Period, Type, Mechanism, and Flag, all set to 'Not set'.

The screenshot shows a 'Confirmation' dialog box. The text inside reads: 'Are you sure that you want to execute the import? Please be aware of the blocking of promotions in Scheduler during the import. Please consider running promotion import by the end of the day.' At the bottom, there are two buttons: 'Yes' and 'No'. The 'Yes' button is circled in red.

**5.** You will receive an email notification with your import results.

If there are any errors in the mail, your import will only be partially successful, and you will need to address the errors listed in the email.

# How to create new promotions using the Excel-file

You can create a new promotion using the Excel-file. To create new promotions using the Excel-file, you must export a Promotions and Products file.

[Follow steps 1-2 in the guide above](#)

**1.** In the exported Promotions and Products file, you must fill out the mandatory fields to import your file.

**⚠ OBS!** You must never make corrections to the headers in row 1 - then the file will fail in the import.

**A – PromotionID:** Must be UserID-Year and then four digits. *Mandatory*

**C – UnitName:** The name of the product or unit.

**E – SalesOut:** Number of CUs sold by the wholesaler – from the POS data. *Mandatory*

A	B	C	D	E
PromotionID	InternalNumber	Unit Name	SalesInn	SalesOut
Co-190155	876543	Orange & Guava 0,33l	0	0
Co-190155	987456	Cherry/Orange/Natural 1,5l mix palle	10	0

**B – InternalNumber:** Must be YOUR internal number of the unit. *Mandatory*

**D – SaleInn:** Number of Units sold to the chain. *Mandatory*

**F – Unit Subsidy:** Is the Unit Cost added in Units and not in CU.

**H – Promo invoice price:** Is the reduced inn price for the promotion.

**J – Promotion Price:** This is always the Unit price.

F	G	H	I	J
Unit subsidy	Percentage subsidy	Promo invoice price	End of period discount %	Promotion Price
1,5				12
1,5				12

**G – Percentage Subsidy:** Is the %Cost. Must be added without % - e.g 10 for 10%

**I – End of period discount %:** Fill out if you use this Trade Term. Must be added without % - e.g 10 for 10%

**⚠ OBS!** You must never make corrections to the headers in row 1 - then the file will fail in the import.

**K – Mechanism:** The promotion mechanism. Must be equal to your pre-set mechanisms. *Mandatory*

**M – Y:** The value of Y from the selected mechanism. *Mandatory*

**O – Chain Name:** The chain name from Retail Chains.

K	L	M	N	O	P
Mechanism	X	Y	State	Chain Name	Chain InternalNumber
BuyXForAmountY	1	12	Planned	Løvbjerg	00011
BuyXForAmountY	1	12	Planned	Løvbjerg	00011

**L – X:** The value of X from the selected mechanism. *Mandatory*  
Except, for the mechanism More Price Points.

**N – State:** The promotion state. Must be one of the following: Planned, Confirmed or Completed. *Mandatory*

**P – Chain InternalNumber:** The chain's internal number from Retail Chains Internal Number. *Mandatory*

**Q – Promotion Name:** Fill out if you have a promotion name.

**S – Simulated:** Must be one of the following: YES or NO *Mandatory*

**U – Start Date:** The Promotion start date. Date format must be: DD-MM-YYYY *Mandatory*

Q	R	S	T	U	V
Promotion Name	Cancelled	Simulated	Promotion Type	Start Date	End Date
Løvbjerg Easter	No	No	Promotion Leaflet	02-04-2020	08-04-2020
Løvbjerg Easter	No	No	Promotion Leaflet	02-04-2020	08-04-2020

**R – Cancelled:** Must be one of the following: YES or NO *Mandatory*

**T – Promotion Type:** The promotion type. Must be equal to your pre-set promotion types from ENG language setting. *Mandatory*

**V – End Date:** The Promotion End date. Date format must be: DD-MM-YYYY *Mandatory*

**⚠ OBS!** You must never make corrections to the headers in row 1 - then the file will fail in the import.

**W – Delivery Start:** Start of delivery for the promotion. Date format must be: DD-MM-YYYY

**Y – Flag:** Fill out is used. Must be equal to your pre-set promotion flags from ENG language setting.

**AA – Promotion Week:** If left empty, the promotion week will be calculated.

**AC – Customer Comment:** Can be filled out, if you have any customer comments. Is visible on customer reports.

W	X	Y	Z	AA	AB	AC
Delivery Start	Delivery End	Flag	Fixed Cost	Promotion week	Internal comment	Customer comment
27-03-2020	02-04-2020		0	2020/14		
27-03-2020	02-04-2020		0	2020/14		

**X – Delivery End:** End of delivery for the promotion. Date format must be: DD-MM-YYYY

**Z – Fixed Costs:** The fixed costs added to the promotion will be visible as *Fixed Subsidy*.

**AB – Internal Comment:** Can be filled out if there are any internal comments.

2. When you have made your corrections, save your file and import it to effectmanager [following steps 4-5 from the guide above.](#)

**⚠ OBS!** Importing the Promotions and Products Excel-file will block Promotion Scheduler while the corrections are being imported. We recommend importing the file at the end of the business hours.

## How to update promotion using the Excel-file

You can use the Excel-file to make corrections to multiple promotions at once.

To make corrections to multiple promotions using the Excel-file, you must export a Promotions and Products file. [Follow Steps 1-2 in the first guide.](#)

**1.** In the exported Promotions and Products file, you can make corrections to all fields of the promotions.

The most common promotion updates by Excel-file is:

- Changes in Promotion State - also canceling promotions
- Changes to Promotion Start and End date
- Changes to Promotion Mechanism

**2.** When you have made your corrections, save your file and import it to effectmanager [following steps 4-5 in the first guide.](#)

**⚠ OBS!** Importing the Promotions and Products Excel-file will block Promotion Scheduler while the corrections are being imported. We recommend importing the file at the end of the business hours.